

NHS Pensions Update – May 2024

In this month's newsletter:

- Sharing our performance - April 2024 (All employers)
- Pensions Online (POL) downtime – May and June 2024 (All employers)
- Updated information is now available to support members with their Choice 2 decision (All employers)
- Member pay and membership information for 2023/24 is required by 6 July 2024 (All employers)
- New guidance and a checklist to support you with the ill health process (All employers)
- SD502 forms don't need to be sent to NHS Pensions (All employers)
- Stakeholder engagement events (All employers)
- Administration Foundation Courses (All employers)
- GP Practice Manager training (GP Practice Managers only)
- NHS Pensions members events (To be shared with all members)

If you don't normally receive this email directly from NHS Pensions or you'd like any other members of your staff to receive a copy, please email stakeholderengagement@nhsbsa.nhs.uk to be added to our distribution list.

The Employer Charter has been temporarily removed whilst it undergoes an update and a revision. We'll republish the updated version as soon as possible. Thanks for your understanding.

Sharing our performance

Table 1- Total Transactions (April 2024)

Item	Volume
Total Transactions	93,786
Apply Annual Increases	1,316
Buy Additional Pension	476
Buy AVCs	83
Buy ERRBO	145
Calculate and Pay Retirement Benefits	8,462
Claim Protection of Pay	14
Complaints	76
Death Benefits Calculated and Paid	7,769
Defer Benefits	1,054
Determine Continuing Entitlement	91
Elect for Scheme Pays	227
Make Enquiry	38,524
Manage Complaint	1,461
Manage Data	15,573
Manage Ongoing Payments	1,597
Manage Overpayment	19

Nominate or Change Beneficiary	2,287
Pension Share/Pensions on Divorce	1,229
Recalculate Retirement Benefits	2,954
Receive Estimate of Benefits	5,878
Receive Savings Statement	237
Refund of Contributions	1,991
Transfers	2,323

Table 2 - First Retirements and Pensioners (April 2024)

Item	Volume
On Time	99%
Amount paid in Lump Sums	£319,650,668.00
Amount of Pension Paid	£74,014,312.00
No. Pensioners in Payment	1,139,430

Table 3 – Employer Helpline statistics (April 2024)

Item	Volume
Total Volume Calls	4,043
Average Handling Time (s)	702
Average Speed of Answer (s)	1,023

Total Volume Emails	3521
Service Level (48 hours)	85.50%
Processing Rate (per hour)	7.1

Table 4 - Member Helpline statistics (April 2024)

Item	Volume
Total Volume Calls	50,509
Average Handling Time (s)	634
Average Speed of Answer (s)	869
Total Volume Emails	41,001
Service Level	86.5%
Processing Rate	9.2

From May 2021 we amended the way we report the number of transactions shown in these tables. The number provided for each function, now records all items of work or transactions we have undertaken within that service area, including the handling of calls, emails, and support work. This change has been made to provide a more comprehensive overview of transactional volumes on a month-by-month basis.

Pensions Online (POL) downtime – May and June 2024

POL will be available throughout May and June between 7am and 7pm apart from the following dates when there will be downtime for scheduled system maintenance:

- Sunday 26 May
- Sunday 23 June

If we do need to bring POL down at short notice for urgent maintenance, we'll advise you as soon as we can in advance via the POL homepage.

Updated information is now available to support members with their Choice 2 decision

Original Choice members, who moved to the 2008 Section, have not been given the option to reverse their Choice decision, as those members could have remained in the 1995 Section.

However, members who had 1995 Section benefits that they decided to move to the 2008 Section – as part of the Choice 2 exercise – may have the option to revisit their decision.

The deadline for members to decide which section they would like to join has been extended to Tuesday 18 June 2024.

We've updated the information available in the [McCloud Hub on our website](#) to help members make their decision.

Members now have access to:

- A factsheet – including an example and answers to common questions
- A decision tree – showing how the age a member wants to retire may affect which Section is best for them
- An illustrator – a tool to help members understand how factors like retirement age, joining date, final salary, and full or part time hours affect pension benefits in both sections of the Scheme

If a member has a question, they can contact mccloudchoice2@nhsbsa.nhs.uk and we'll respond within two weeks.

Member pay and membership information for 2023/24 is required by 6 July 2024

You must provide pay (and membership) information for members by 6 July following the end of the tax year to enable pensions savings statements to be provided to members. A pensions savings statement is important as it tells members whether they have exceeded the annual allowance limit in the NHS Pension Scheme.

We expect to see an increase in the number of requests for pensions savings statements in July. You are required to provide pay and membership information for 2023/24 by 6 July 2024 so we're able to provide these statements.

Members could be subject to fines and late payment penalties from HMRC if they do not receive their statement(s).

HMRC may also impose fines and charges on you of £300 per member and a further £60 per day per member, until the member's record is updated.

Special arrangements were made for PCSE/NHS England in relation to the provision of information for GPs once their end of year certificates have been received and the provision of pension information to NHS Pensions after HMRC's deadline.

New guidance and a checklist to support you with the ill health process

New guidance and a checklist are available in the [Employer Hub on our website](#) to support you with the ill health process.

The guidance contains all the information you need to know about the process while the checklist helps you ensure all sections of the AW33E application form are completed correctly before submission.

AW33E application forms should be returned to NHS Pensions via email to pensionscanquery@nhsbsa.nhs.uk or via post to NHS Pensions, PO Box 683, Unit 5, Newcastle Upon Tyne, NE5 9EE.

It's important that you don't close a member record until their ill health application has been accepted.

For serious ill health applications where life expectancy is less than 12 months, an AW33E, AW8 and AW341 (if applicable) must be emailed to medoperations@nhsbsa.nhs.uk. Mark in the subject of the email that it is for a 'serious ill health case.'

The NHS Pensions Stakeholder engagement team are hosting a virtual training event for employers on Wednesday 24 July 2024 at 10:30am.

This event will be looking at Ill Health retirement and the process involved for both employers and members.

Topics covered will include:

- Eligibility
- How to apply and forms needed
- Ill Health assessment and decision
- Leave and Career breaks
- Serious Ill Health

To reserve a place for this event, visit our [Eventbrite page](#).

SD502 forms don't need to be sent to NHS Pensions

The application form to leave the NHS Pension Scheme (SD502 form) should be retained for your own records, following your own data retention policy, and do not need to be sent to NHS Pensions.

You can access the up-to-date version of the SD502 form from the [Member Hub on our website](#).

Stakeholder Engagement events

The Stakeholder Engagement Team run a series of free events throughout the year providing regular updates and delivering educational training. Some events include CPD accreditation and details of upcoming events are available on the [Employer Hub on our website](#).

We do not endorse any third-party training events.

If your organisation would like to request training or attendance directly from the Stakeholder Engagement Team, please complete the event/meeting request form and email the team: stakeholderengagement@nhsbsa.nhs.uk

Administration Foundation Course dates for 2024

This free course is available to all new local administrators of the NHS Pension Scheme who are less than 12 months in post and provides an overview of what is expected of you as an NHS Pension Scheme administrator throughout a Scheme year.

At the end of the course, you will have a high-level understanding of the actions required to enable you to administer the NHS Pension Scheme at a local level. The course could also be used as a refresher course for anyone restarting in local NHS Pension Scheme administration.

The details for the next available course are available on the [Employer Hub on our website](#).

GP Practice Manager training

Further dates are available for the Level 1 and Level 2 GP practice manager (free) events, which include educational training tailored for practice managers, delivered via Microsoft Teams. Practice managers need to attend the whole training session to receive a Continued Professional Development (CPD) accreditation.

Foundation course

Details for the next available course are available on the [Employer Hub on our website](#).

Level 1 GP Practice Manager events

This session includes information on the NHS Pension Scheme website, Annual Benefit Statements, roles, and responsibilities, Pensions Online (POL), the AW8 and the member journey. Details for the next available course are available [Employer Hub on our website](#).

Level 2 GP Practice Manager events

These sessions include roles and responsibilities, flexible retirement, leave overview, ill health, and family benefits. Details for the next available course are available [Employer Hub on our website](#).

Member events dates for June 2024

These regularly held events aim to help members understand everything they need to know about their NHS pension. Whether you're a new member wanting to learn how to navigate the Scheme, or a long-time member wanting to refresh your knowledge, these events are engaging, informative and a must for any NHS Pension Scheme member.

On average, over 99% of attendees would consider recommending our member events to a colleague, with an average quality rating of 4.4/5.

All our member events have options for both members in the 2015 NHS Pension Scheme and members in both the 1995/2008 and 2015 schemes.

Monthly events include:

- Understanding the NHS Pension Scheme
- Your Annual Benefit Statement explained
- Exploring your retirement options

[Find out more on the Member events section of the Member Hub](#)